

Message Text

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ACTION EA-10

INFO OCT-01 ISO-00 CIAE-00 DODE-00 PM-03 H-01 INR-07 L-02

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OMB-01 /074 W

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R 310600Z JAN 75

FM AMEMBASSY SAIGON

TO SECSTATE WASHDC 2362

INFO AMEMBASSY PHNOM PENH

AMEMBASSY BANGKOK

AMEMBASSY VIENTIANE

AMCONSUL DANANG

AMCONSUL NHA TRANG

AMCONSUL BIEN HOA

AMCONSUL CAN THO

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PASS FAS/AMS/USDA

E.O. 11652: N/A DECLAS 1/30/76

TAGS: ECRP, VS

SUBJECT: RICE SITREP FOR DECEMBER 1974 CERP 4012

REF: SAIGON 15765

1. SUMMARY. DELTA DELIVERIES PICKED UP IN DECEMBER,
BUT DEFICIT AREA APPARENT CONSUMPTION IN 1974 FELL
SHARPLY FROM PREVIOUS YEARS. WE BELIEVE THE EXPLANATION
LIES IN UNDERREPORTING OF DELTA DELIVERIES, A DECLINE
IN REAL PER CAPITA CONSUMPTION, AND AN INCREASE IN
DEFICIT AREA PRODUCTION. THE GVN HAS ANNOUNCED NEW
NFA RICE BUYING PRICES ABOUT THE SAME AS THOSE IN EFFECT
SINCE LAST JULY, AND HAS BEGUN A PROGRAM OF ACCEPTING DELIVERIES
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OF DELTA RICE EITHER IN THE DELTA OR SAIGON FROM MERVHANTS.

A NUMBER OF NEW CREDIT MEASURES APPLICABLE TO RICE MARKETING HAVE ALSO BEEN INTRODUCED. DELTA PADDY PRICES DECLINED IN DECEMBER, WHILE SAIGON RICE PRICES ROSE AS THEY HAD LAST MONTH.

2. END DECEMBER SAIGON AND CENTRAL VIETNAM STOCKS (1,000 MT)

SAIGON IMPORTED	42.5
SAIGON DOMESTIC	59.5
SAIGON PRIVATE	11.8
DEFICIT PROVINCES	102.8
	216.6

3. DECEMBER APPARENT CONSUMPTION (1,000 MT)

BEGINNING STOCKS	232.0
DELTA DELIVERIES (ADJUSTED)	45.0
IMPORTS	0
TOTAL AVAILABLE	277.0
MINUS END DECEMBER STOCKS	216.6
MINUS CAMBODIAN LOAN	5.0
DECEMBER APPARENT CONSUMPTION	55.4

4. REPORTED DELTA DELIVERIES FOR DECEMBER WERE 39,500 MT, WHICH WE HAVE ADJUSTED TO 45,000 MT IN ACCORDANCE WITH OUR RECENT PRACTICE. TOTAL DELTA DELIVERIES FOR 1974 ARE 555,300 MT, INCLUDING, ACCORDING TO OUR COUNT, AND ESTIMATED 64,300 MT OF RICE OR RICE EQUIVALENT DELIVERED TO SAIGON WITHOUT BEING RECORDED AT THE POLICE CHECKPOINTS. THE GVN ALSO PRIVATELY ESTIMATES UNREPORTED DELTA DELIVERIES, AND MINISTRY OF TRADE AND SUPPLY OFFICIALS AS WELL AS NFA OFFICIALS ARE WILLING TO CONCEDE THAT ACTUAL, AS OPPOSED TO REPORTED, DELTA DELIVERIES MAY HAVE BEEN AS HIGH AS 585,000 MT. ONE MTS SOURCE THINKS THE FIGURE MAY EVEN HAVE REACHED 600,000 MT.

5. BEGINNING JANUARY 1, THE SITREP WILL USE THE DELTA DELIVERY FIGURES COMPILED BY THE ECONOMIC SERVICE OF SAIGON CITY ADMINISTRATION. WE HAVE NOT USED THESE FIGURES IN THE PAST BECAUSE WE WERE NOT ABLE TO GET THEM ON A TIMELY BASIS BUT HAVE NOW ARRANGED TO DO SO. INSTEAD, WE HAD A LOCAL EMPLOYEE VISIT THE RICE CHECKPOINTS ON QL-4 AND ON THE BARGE ROUTE ON A WEEKLY LIMITED OFFICIAL USE

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BASIS TO COPY THE FIGURES RECORDED IN THE POLICE WORKBOOK. FURTHER STUDY INDICATES THE FIGURES FROM THE CITY GOVERNMENT ARE PROBABLY MORE ACCURATE. AS A RUNNING CHECK ON THE CITY FIGURES, WE WILL CONTINUE TO COMPARE THEM WITH TXJ WUFRZFLUOM OTHER SOURCES INCLUDING THE MINISTRY OF TRADE AND SUPPLY (MTS), NFA, AND PROVINCE ECONOMIC SERVICES. COMPARING PAST DATA, NFA REPORTED DELTA DELIVERIES OF 537,000 MT IN 1974; THE CITY, TRINPPP MT; AND THE MTS INSPECTOR IN CAN THO, 561,700 MT

BASED ON PROVINCE EXPORT PERMITS OF 488,400 MT PLUS A 15 PER-CENT INCREMENT FOR ESTIMATED UNREPORTED DELIVERIES. ONE EXPLANATION FOR THE DIFFERENCE BETWEEN THE MTS INSPECTOR'S FIGURES AND OUR UNADJUSTED FIGURES ON THE ONE HAND, AND THE NFA AND CITY FIGURES ON THE OTHER, IS THAT THE FORMER ARE BASED ON PERMITS, AND THE LATTER, ON ACTUAL SHIPMENTS. NFA OFFICIALS SAY THEIR FIGURE IS LOWER THAN THE CITY'S BECAUSE THE LATTER MANS CHECKPOINTS ON A 24 HOUR BASIS WHILE THE NFA MAN GOES HOME DURING CURFEW.

6. USING OUR DELTA DELIVERY FIGURE OF 555,300 MT, 1974 APPARENT CONSUMPTION IS ESTIMATED AS FOLLOWS:

1974 APPARENT CONSUMPTION (1,000 MT)

BEGINNING STOCKS	56.3
DELTA DELIVERIES (ADJUSTED)	555.3
IMPORTS	304.5
TOTAL AVAILABLE	916.1
MINUS END YEAR STOCKS	216.6
MINUS LOAN TO CAMBODIA	45.0
1974 APPARENT CONSUMPTION	654.5

USING A DELTA DELIVERY FIGURE OF 600,000 MT WOULD GIVE A YEARLY APPARENT CONSUMPTION FIGURE OF 699,200 MT.

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OMB-01 /074 W

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R 310600Z JAN 75

FM AMEMBASSY SAIGON

TO SECSTATE WASHDC 2363

INFO AMEMBASSY PHNOM PENH

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7. APPARENT AVERAGE MONTHLY CONSUMPTION IN THE DEFICIT AREA
AS COMPUTED FROM THE RICE SITREP SERIES FOR PREVIOUS YEARS
IS AS FOLLOWS:

YEAR	DEFICIT AREA APPARENT ANNUAL CONSUMPTION(1) (1,000 MT)	DEFICIT AREA POPULATION FROM JULY HES CONSUMPTION(1) (KG)	PER CAPITA ANNUAL AVERAGE
1974	654.5	12,595,000	50.9
1973	769.1	12,241,000	63.0
1972	770.5	11,732,000	65.9
1971	762.3	11,615,000	65.7

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1970	947.2	11,498,000	82.4
1969	943.6	11,300,000	83.5
1968	850.3	11,102,000	76.6
1967	941.6	10,831,000	87.2
1966	751.6	10,601,000(2)	70.9
1965	611.8	10,376,000(2)	58.8

(1) OF IMPORTED RICE AND DELTA RICE ONLY.

(2) EXTRAPOLATED.

8. THE PRECIPITOUS DEOP IN PER CAPITA ANNUAL APPARENT CONSUMPTION
IS TOO LARGE TO BE ENTIRELY BELIEVABLE. WHILE IT ALMOST CERTAINLY
WENT DOWN SOME IN 1974 BECAUSE OF GROWING UNEMPLOYMENT AND
DEPRESSED PERSONAL INCOMES, OTHER FACTORS ARE PROBABLY ALSO
INVOLVED. UNDERREPORTING OF DELTA DELIVERIES IN SIGNIFICANTLY
GREATER AMONTS THAN WE HAVE ALREADY ALLOWED FOR IS ONE EXPLANATION.
ANOTHER IS GREATER DEFICIT AREA PRODUCTION.

9. AVERAGE ANNUAL DEFICIT AREA PER CAPITA CONSUMPTION OF IMPORTED
AND DELTA RICE FOR THE NINE YEARS PRIOR TO 1974 WORKS OUT TO 72.7
KG ACCORDING TO THE FIGURES ABOVE. IF THIS FIGURE HAD APPLIED
IN 1974, DEFICIT AREA APPARENT ANNUAL CONSUMPTION WOULD HAVE
BEEN 919,000 MT, WHICH WOULD HAVE REQUIRED DELTA DELIVERIES OF

814,000 MT (OR AN OFFSETTING DRAWDOWN OF STOCKS). EVEN USING THE RELATIVELY LOWER AVERAGE OF 1971-73 AS GUIDELINE (IE 64.9 KG PER CAPITA OR 817,700 MT AVERAGE ANNUAL CONSUMPTION) PRODUCES A THEORETICAL DELTA DELIVERY FIGURE FOR 1974 OF 718,600 MT.

10. TOTAL PER CAPITA AVAILABILITY IN THE DEFICIT AREA IS A MORE DIFFICULT FIGURE TO DETERMINE SINCE IT DEPENDS ON ESTIMATES OF DEFICIT AREA PRODUCTION. A RECENT MISSION STUDY USING BEST ESTIMATES OF DEFICIT AREA PRODUCTION ALONG WITH GIVEN FIGURES FOR IMPORTS AND CHANGES IN STOCKS, CONCLUDED THAT DELTA DELIVERY FIGURES GIVEN IN THIS SITREP SERIES FOR 1974 WOULD ALLOW TOTAL PER CAPITA DEFICIT AREA AVAILABILITY OF RICE FOR FOOD AND INDUSTRIAL USES OF ONLY ABOUT 114 KG FOR THE YEAR. AN UPWARD ADJUSTMENT OF 225,000 MT TO 1974 DELTA DELIVERIES WOULD THEN BE REQUIRED TO BRING THIS FIGURE UP TO 132 KG PER CAPITA, A WORKING FIGURE WE HAVE USED IN THE PAST.

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11. GVN OFFICIALS ARE NOT WILLING TO ADMIT THAT SUCH WIDE DISCREPANCIES BETWEEN REPORTED AND ACTUAL DELIVERIES COULD EXIST. IF NOT, THE DECLINE IN PER CAPITA APPARENT CONSUMPTION IN 1974 FROM PREVIOUS YEARS CAN BE EXPLAINED AS FOLLOWS: ACTUAL PER CAPITA CONSUMPTION IN THE DEFICIT AREA IS DOWN; PRODUCTION IN THE DEFICIT AREA HAS BEEN BETTER THAN WE HAVE ESTIMATED; AND/OR PRIVATE STOCKS IN THE DEFICIT AREA, PARTICULARLY IN CENTRAL VIETNAM, WERE UNUSUALLY HIGH AT THE BEGINNING OF 1974 AND WERE DRAWN DOWN SIGNIFICANTLY IN THE COURSE OF THE YEAR.

12. UNDOUBTEDLY, THERE HAS BEEN A DECLINE IN PER CAPITA CONSUMPTION IN THE DEFICIT AREA. REPORTS OF HIGH UNEMPLOYMENT, DECLINING REAL INCOMES AND DIET SWITCHES FROM RICE TO GRUEL, MANIOC, AND SWEET POTATOES, ALL ATTEST TO THIS. IT IS ALSO POSSIBLE THAT WE HAVE BEEN UNDERESTIMATING PRODUCTION IN CENTRAL VIETNAM. NINH THUAN AND PHU YEN PROVINCES ARE REPORTING SURPLUSES FOR THE FIRST TIME. MR-2, IN PARTICULAR, APPEARS TO HAVE HAD GOOD SUCCESS WITH TN RICE IN THE LAST SIX MONTHS, AND IS PROJECTED TO REQUIRE ONLY ABOUT 75,000 MT OF DELTA OR IMPORTED RICE IN 1975. IN WHAT RATIO HIGHER PRODUCTION AND LOWER CONSUMPTION ACCOUNT FOR THESE TRENDS, THOUGH, HAS YET TO BE DETERMINED. AS FOR PRIVATE STOCKS OF DOMESTIC RICE, WE HAVE ALWAYS CONSIDERED THESE TO BE NEGLIGIBLE IN CENTRAL VIETNAM AND CONSUMED DURING THE MONTH BROUGHT IN. IF SUCH STOCKS EXISTED, THOUGH, THE ECONOMIC CLIMATE IN CENTRAL VIETNAM, PARTICULARLY IN MR-1, FOR THE PAST SIX MONTHS WOULD HAVE BEEN CONDUCIVE TO A DRAWDOWN.

13. UNDER THE CIRCUMSTANCES, IT MIGHT APPEAR LOGICAL TO USE A HIGHER DELTA DELIVERY FIGURE THAN WE HAVE TO EXPLAIN THE APPARENT DISCREPANCY BETWEEN 1974 AND PREVIOUS YEARS. THE PROBLEM IS THAT WHILE THERE UNDOUBTEDLY WERE UNREPORTED DELIVERIES OF SOME

MAGNITUDE IN 1974, THESE ALSO OCCURRED IN PREVIOUS YEARS. IT IS TRUE THAT THE 1:1 RULE, REQUIRING MERCHANTS TO SELL ONE BAG OF RICE TO NFA FOR EVERY BAG SOLD ON THE FREE MARKET, WHICH WAS IN EFFECT FROM MARCH THROUGH OCTOBER, WAS AN ENCOURAGEMENT NOT TO REPORT RICE SENT TO SAIGON. IN ADDITION, THE LEGALIZATION OF THE SHIPMENT OF LOTS OF 500 KG OR LESS WITHOUT AN EXPORT PERMIT MUST ALSO BE CONSIDERED. STILL, THE MAIN INCENTIVE NOT TO REPORT REMAINS WHAT IT HAS BEEN IN THE PAST: THE REQUIREMENT FOR AN EXPORT PERMIT TO MOVE RICE OUT OF A PROVINCE. GIVEN THIS FACTOR, AND THE UNSUBSTANTIATED ESTIMATES OF UNRECORDED MOVEMENT LIMITED OFFICIAL USE

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OF RICE TO SAIGON IN PAST YEARS, WE FIND IT IMPOSSIBLE TO USE INCREASED UNREPORTED DELIVERIES TO EXPLAIN ALL OF THE REDUCED APPARENT CONSUMPTION IN DEFICIT AREAS.

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FM AMEMBASSY SAIGON

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14. ALTHOUGH A DEFINITIVE JUDGMENT WOULD BE PREMATURE, THE SHARP INCREASE IN MILITARY ACTIVITY IN THE DELTA HAS SO FAR HARDLY, IF AT ALL, INTERFERED WITH THE MOVEMENT OF PADDY TO THE MILLS AND THE MOVEMENT OF RICE OR PADDY TO SAIGON. ALTHOUGH THERE HAS BEEN SOME MINOR RE-ROUTING OF WATER-BORNE TRAFFIC DUE TO THE SECURITY SITUATION, THE PRINCIPAL LAND AND WATER ROUTES OF COMMUNICATION FROM THE DELTA ARE OPEN AND UNDER GVN CONTROL. SOME COMMUNIST ACTIVITY IS DIRECTED AT LEVYING TAXES AND THERE ARE SOME REPORTS THAT THE COMMUNISTS HAVE RAISED THEIR TAX TO 600 PIASTERS PER BAG FOR RICE MOVING OUT OF AREAS THEY CONTROL.

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GVN RICE POLICY

15. THE GVN HAS ANNOUNCED NEW NFA BUYING PRICES FOR RICE ON A BASE 300\$ PER BAG LOWER THAN THE PRICES WHICH HAVE BEEN IN EFFECT SINCE LAST JULY. NFA PAYS A BONUS FOR LARGE SHIPMENTS: 200\$ PER 100 KG BAG FOR 20-100 MT LOTS; 300\$ PER BAG FOR QPQAEPP MT LOTS; 400\$ FOR EPQATPP MT LOTS; AND 500\$ FOR LOTS OF MORE THAN 500 MT.

16. NFA WILL, FOR THE FIRST TIME, ACCEPT DELIVERIES FROM MERCHANTS IN THE DELTA, BUT WILL PAY 900\$ PER BAG LESS THAN IF THE MERCHANTS DELIVERED THE RICE TO SAIGON. THIS DIFFERENTIAL COVERS TRANSPORTATION COSTS, LOSSES, INSURANCE, PAYMENT OF THE PROVINCE EXPORT TAX, AND STEVEDORING.

17. MERCHANTS COMPLAIN THAT THEIR MARGINS ARE BEING SQUEEZED BY LOWER PRICES FOR BRAN AND BROKENS THAN LAST JULY, HIGHER PRICES FOR RICE BAGS, AND HIGHER TAXES. THEY APPROVE OF THE 900\$ DIFFERENTIAL BETWEEN BUYING PRICES IN SAIGON AND THE DELTA, SAYING THAT MERCHANTS WHO OWN TRUCKS OR BARGES WILL PROBABLY CONTINUE TO SHIP RICE TO SAIGON, WHILE THOSE WHO NORMALLY RENT TRANSPORT WILL PROBABLY ATTEMPT TO SELL RICE TO NFA IN THE DELTA.

18. CREDIT FOR RICE MERCHANTS HAS BEGUN TO FLOW AGAIN WITH 8 PERCENT MONEY AVAILABLE FOR 45 DAY CONTRACTS, AND 18 PERCENT MONEY AVAILABLE FOR 90 DAY CONTRACTS FOR DELIVERY IN CENTRAL VIETNAM. IN ADDITION 27 PERCENT MONEY IS AVAILABLE FOR 9 MONTH PERIODS FROM THE GVN'S COMMERCIAL BANK TO MERCHANTS WILLING TO PROMISE TO SELL NFA AN AMOUNT OF RICE EQUIVALENT

TO DOUBLE THE AMOUNT OF THE LOAN OVER THE PERIOD OF THE LOAN.
THE TERMS ARE CLEARLY LESS FAVORABLE THAN THOSE THAT EXISTED
A YEAR AGO.

19. PRICES:

A. DELTA PADDY AT THE MILL (WEIGHTED AVERAGE PER 100 KILOS)

JAN 1 JUL 1 SEPT 1 OCT 1 NOV 1 DEC 1 JAN 1/75

HIGH QUALITY 10042 12604 14224 13372 14849 14254 12670
MEDIUM QUALITY 9200 12153 13134 12592 13110 13154 11713
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B. SAIGON WHOLESALE RICE PRICES (100 KILOS)

JAN 1 JUL 8 SEPT 2 OCT 14 NOV 25 DEC 30 JAN 20

NANG HUONG 23000 22800 24000 23800 23200 24800 25300
SOC NAU 15300 18800 20100 20000 19200 20200 20300
NO 1 25-
PERCENT 14700 18100 19000 19100 18500 19000 19200
MIRACLE
RICE 14200 17700 18200 18300 17500 17900 17800

C. SAIGON RETAIL RICE PRICES (100 KILOS)

JAN 1 JUL 8 SEPT 2 OCT 14 NOV 25 DEC 30 JAN 20

NANG HUONG 24800 24800 25500 25500 24200 25800 26500
SOC NAU 17300 20000 21000 21000 20200 21200 21200
NO 1 25-
PERCENT 16500 18800 19600 19900 19000 19600 19800
U.S. MED-
IUM 16200 18000 19600 19800 19000 19500 19500
U.S. LONG 17200 19800 20500 20600 20200 21000 21000

20. PADDY PRICES IN THE DELTA DECLINED DURING DECEMBER AS
THE MAIN HARVEST CONTINUED. DECEMBER PRICES WERE FURTHER DEPRESSED
BY THE FACT THAT MOST NEW PADDY HAD A HIGH MOISTURE CONTENT
AS A RESULT OF UNUSUALLY FREQUENT DECEMBER AND JANUARY RAINS,
WHICH HAMPERED DRYING. RICE PRICES IN SAIGON HAVE CONTINUED
THE RISE REPORTED IN THE LAST SITREP. NANG HUONG PRICES,
WHICH REMAINED ALMOST STEADY THROUGHOUT 1974, ARE NOW LEADING
THE RISING PRICE TREND, REFLECTING DEMAND FOR GOOD QUALITY
RICE FOR TET CELEBRATIONS.
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Message Attributes

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